

Department of Health Bureau of Public Health Laboratories



WEBLIMS - USER GUIDE

Welcome to WebLIMS!

Department LIMS			Doc. Ver. No. 03			
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TABLE OF CONTENT

CONTENTS

Table of content	2
General information	4
Basic conventions used	5
System requirements	5
Logging in	6
Reports	11
Report selection	11
Patient reports	13
Sample status report	17
Monthly Statistics Reports	19
Monthly Statistics Report	20
Abnormal Report	21
Unsatisfactory Report	24
Epidemiology reports	27
Printing reports	31
Ordering	33
Create orders	33
Sample tab field Entry information	38
Tube ID	38
Submitter (Hospital, Clinic, Office, etc):	39
Practitioner (doctor, Clinician, etc.)	40
Receiving lab	41
Specimen collection date	42
ICD-10 code	43
Outbreak related	44
Program component	44
Special project id and comments	45
Test category	45
Specimen source	46

Select tests and panels	47
Patient tab fields entry information	48
Search for patient	48
First name, Last name, DOB	49
Name suffix	49
Patient ID	49
Social Security Number	49
Pregnant	50
Has insurance	50
Insurance tab fields entry information	51
Insurance Type	51
Insurance Name, Policy No., Group No.	51
Other insurance information	51
Insurance 2, Insurance 3	52
Reprint Order requisitions	53
Troubleshooting	56
Browser option configuration	56
Contact information	62

GENERAL INFORMATION

Purpose

This SOP provides guidelines on how to use the LabWare WebLIMS Module which gives authorized submitters and epidemiologists¹ access to LabWare to submit orders and to view and print reports for their patients or patients in their authorized territory/region.

Scope

This SOP is for all users of LabWare WebLIMS. Users consist of authorized personnel and sample submitters to Florida Department of Health Bureau of Public Health Laboratories as well as Florida Department of Health state and local epidemiologists.

¹ To become an authorized user, please visit http://www.floridahealth.gov/programs-and-services/public-health-laboratories/weblims-ra.html complete and submit the Computer Use and Confidentiality and WebLIMS Access Request Forms.

BASIC CONVENTIONS USED

1. Blue field name: these are fields that require entry.



- 3. Fields with drop down: generally these fields require user to enter the information by selecting from the drop down list.



- 4. There is a time-out function to the ordering process. This is approximately 10 minutes.
 - a. Once timed out, user will need to log back in and restart the process.



Click "Create New Session" to re-enter and start over.

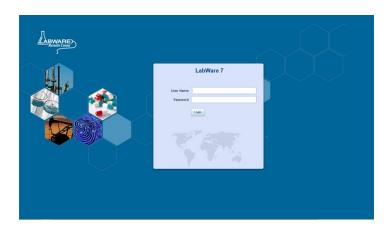
SYSTEM REQUIREMENTS

Browser options required for WebLIMS:

- 1. Allow session cookies
- 2. Allow pop-ups
- 3. Allow JavaScript

For help configuring your internet browser to allow these options, please refer to the <u>Troubleshooting</u> <u>section</u>.

1. Click https://weblims.floridapublichealthlab.com/



- 2. In the login page, enter the user name and password received from BPHL.
- 3. Click the LOGIN button.



4. Select your role from the drop down menu and select OK.

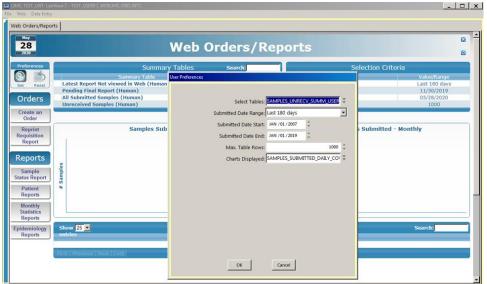


PLEASE NOTE: To place orders, User MUST select the "_WEBLIMS_ORD_RPT" Role

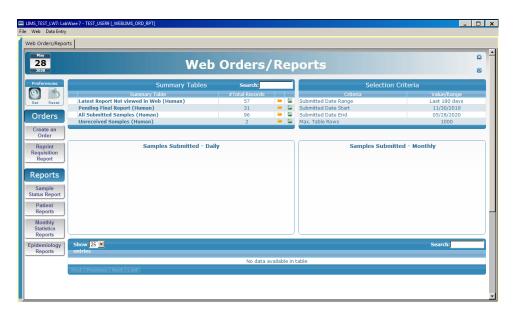
- 5. The workflow selection screen will be displayed.
 - a. Click "Set" under Preferences to choose Summary Tables and desired parameters for Selection Criteria. Summary Tables, Selection Criteria and Charts will appear blank until parameters are selected. Once set, these preferences will be the default preferences for the user. These may be reset at any time by clicking "Reset".



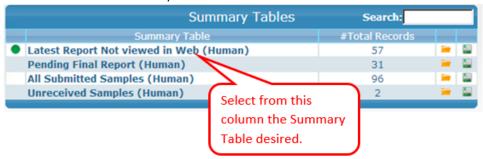
b. The User Preferences Window will appear. Select Tables and choose Date Ranges, Max Rows and Charts Displayed here.



c. The Summary Tables and Selection Criteria chosen will be listed.



d. Select the desired Summary Table from the list to view.



e. The Charts and Data for the Summary Table Selected will be displayed. The type of chart displayed will depend on the selection.



f. If desired, the data for the Summary Table selected may be exported as an Excel file.



PLEASE NOTE: Users can only place orders for providers/practitioner authorized for the user. The user's professional organization and role dictate authorized providers/practitioners. If the providers/practitioners displayed are not consistent with those under the user's purview, please log out immediately and notify BPHL Help Desk at (904) 791-1567 or DLBPHLLAR@flhealth.gov

REPORT SELECTION

1. To view reports in WebLIMS, select from the Reports buttons on the Workflow:



- 2. Select the desired report to run.
 - a. **Patient Reports**: Allows access to individual test reports for patients.
 - b. **Sample Status Report**: Allows access to status of samples submitted.
 - c. Monthly Statistics Reports:
 - Monthly Statistics Report: Provides monthly statistics by submitter as number of samples submitted and number of tests performed for each analysis within a given time period.
 - ii. **Abnormal Report**: Provides monthly abnormal samples by submitter. This report lists total number of samples submitted, total normal and abnormal samples, and test summary noting number of normal and abnormal tests for each analysis within a given time period.
 - iii. **Unsatisfactory Report**: Provides the number of unsatisfactory samples received from a submitter for a given time period. Sample Unsatisfactory Reasons are noted in the report if requested with details.
 - d. **Epidemiology Reports**: Provides the number of samples submitted by program and county and number of tests by program, analysis and county within a given time period.

3. To run subsequent reports, begin again at the Web tab, select the report to run and enter the parameters. Within the same session, the report parameters will repopulate with parameters last entered.

PLEASE NOTE: Ensure the Explorer Window is minimized. If the window is maximized, reports run will not be visible until the window is minimized.

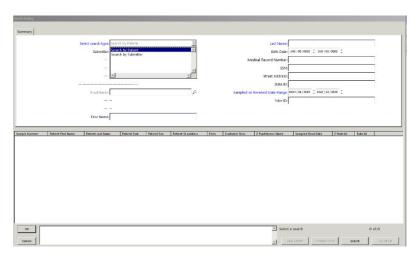
PATIENT REPORTS

General Search Information:

Most search fields (except dates) do not have to be entered completely. Search may be performed by entering the first few characters; however, please note partial matches will be displayed which contain the characters in any position, not only at the beginning. For instance, for the last name "Test", if only "Te" is entered, "Martes" would also be displayed in the search results for potential matches.

Searching under Patient Reports allows access to individual test reports for patients.

1. Select one of the search options.



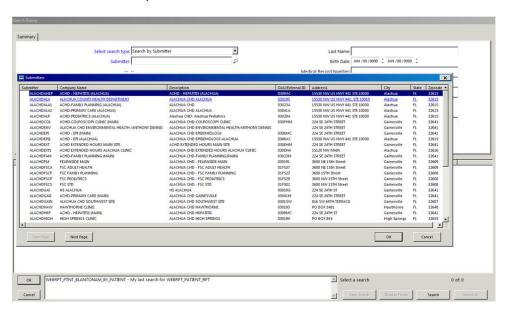
a. If searching by Patient, enter the desired report parameters in the Patient Search Screen. The Last Name and Sampled or Received Date Range fields are required fields.



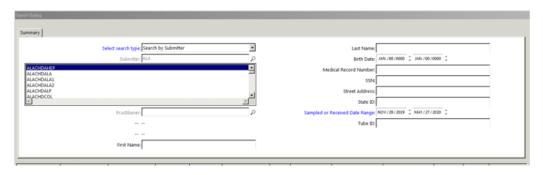
b. If searching by Submitter, enter the desired report parameters in the Submitter Search Screen. The Submitter and Sampled or Received Date Range fields are required fields.



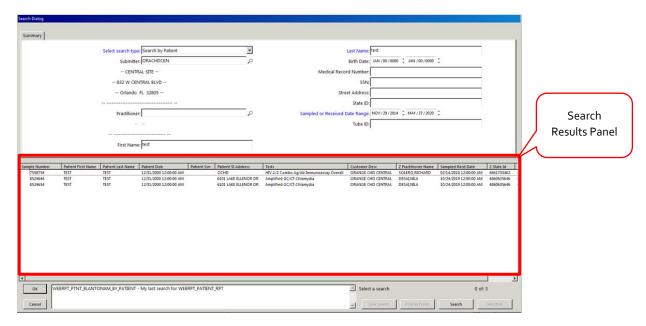
Clicking the Search Icon for the Submitter field will display all Submitters assigned to the user's access. If multiple locations are listed for the same Submitter name, care should be taken to select the Submitter entry with the correct address.



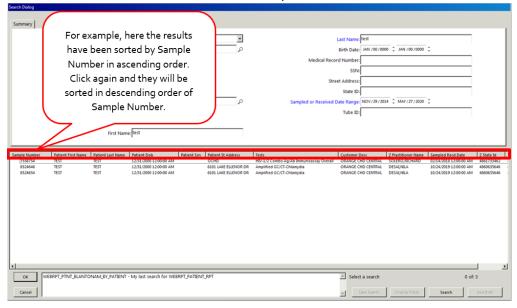
If the LIMS Submitter code is known, this may be entered in the Submitter field. If only a few characters are entered in this field, pressing "Enter" will display all relevant submitter codes assigned to the user's access.



- 2. Select Search when finished.
- 3. The search results available for selection will be displayed at the bottom of the screen.

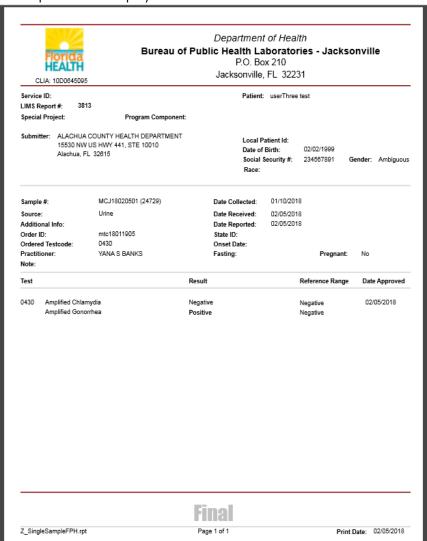


4. Search results may be sorted ascending or descending by clicking on any column header in the Search Results Panel. Results will be sorted by the information within the selected column.



5. Select the report and click "OK", or double click the selected record.

6. The report will be displayed.



7. Print or save the report if desired by following the steps on Printing Reports (P. 31).

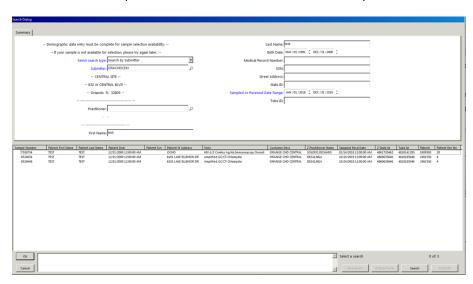
SAMPLE STATUS REPORT

The **Sample Status Report** provides status of samples submitted. Unofficial Reports would be displayed under this option. Status of Samples (i.e., Pending, Cancelled, etc.) is displayed under "Results" on the Unofficial Reports. Final, Official Reports are obtained under Patient Reports.

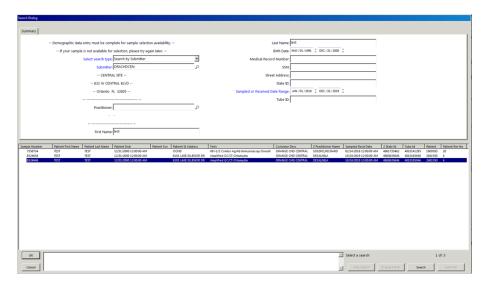
1. Select Search Type.

As with Patient Reports: when searching by Patient, the Last Name and Sampled or Received Date Range fields are mandatory; when searching by Submitter, the Submitter and Sampled or Received Date Range fields are mandatory.

Enter the desired parameters and click Search in the Sample Status Search Dialog box.

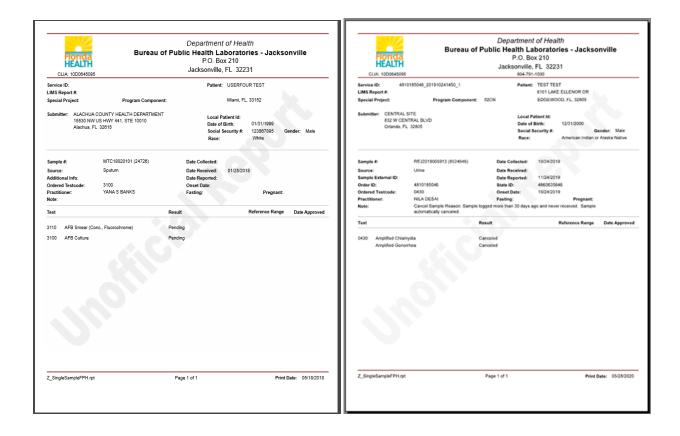


2. Select the patient record to view in the Query Select Dialog box



3. Click OK or double click to view the selected Sample Status reports.

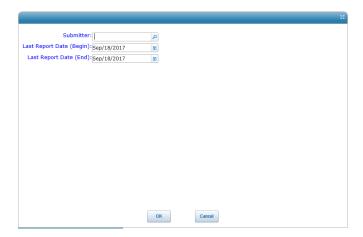
4. The report will be displayed. Reports viewed under Sample Status Reports will always be labeled "Unofficial Report." Official reports may be viewed through the Patient Reports option.



MONTHLY STATISTICS REPORTS

Monthly Statistics Reports include the **Monthly Statistics Report**, the **Abnormal Report** and the **Unsatisfactory Report**.

- The **Monthly Statistics Report** provides monthly statistics by submitter as number of samples submitted and number of tests performed for each analysis within a given time period.
- The **Abnormal Report** provides monthly abnormal samples by submitter. This report lists total number of samples submitted, total normal and abnormal samples, and test summary noting number of normal and abnormal tests for each analysis within a given time period.
- The **Unsatisfactory Report** will list the number of unsatisfactory samples received from a submitter for a given time period. It can be run in two ways- with or without details. Sample Unsatisfactory Reasons are noted in the details.
- 1. In the displayed dialog box, enter desired parameters in all three fields as they are mandatory.



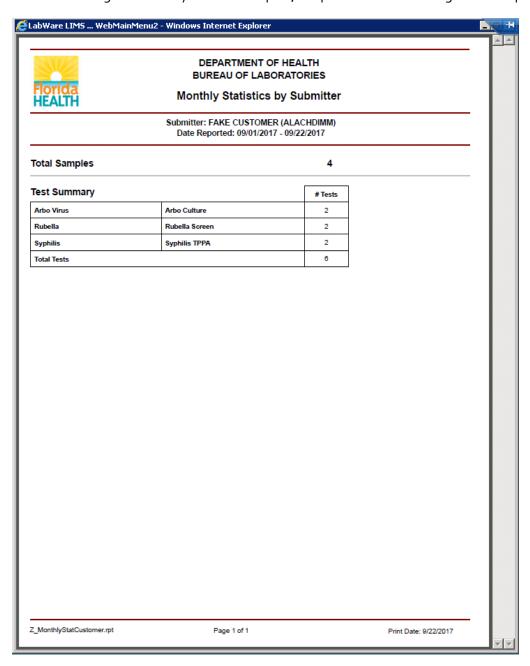
- 2. Click OK to continue.
- 3. There are 3 different statistical reports available.
- 4. In the displayed Select Dialog box, select the desired statistical report, and click "OK."



MONTHLY STATISTICS REPORT

The **Monthly Statistics Report** provides monthly statistics by submitter as number of samples submitted and number of tests performed for each analysis within a given time period.

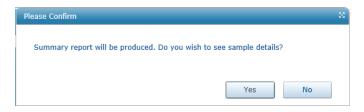
5. When selecting the Monthly Statistics Report, a report like the following will be displayed:



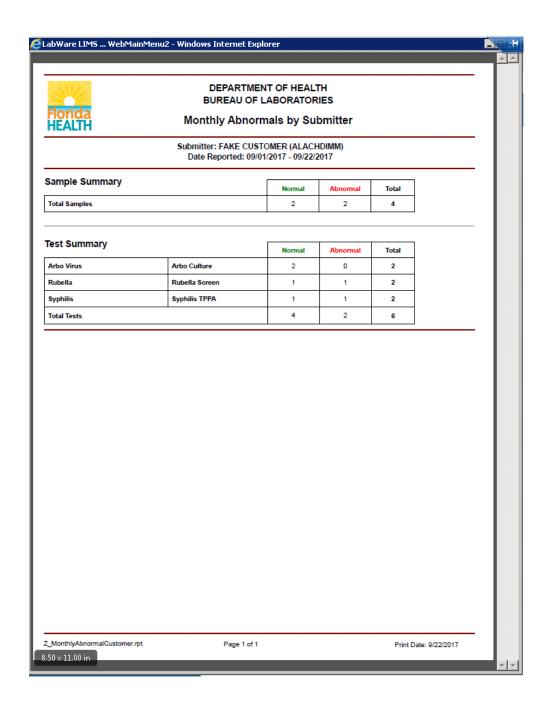
ABNORMAL REPORT

The **Abnormal Report** provides monthly abnormal samples by submitter. This report lists total number of samples submitted, total normal and abnormal samples, and test summary noting number of normal and abnormal tests for each analysis within a given time period

- 6. When selecting Abnormal Report:
 - a. Select whether to run the report with or without details.



b. The Abnormal Report (shown below) will be displayed.



The following is the second page of the same Abnormal Report if requested with details:



DEPARTMENT OF HEALTH BUREAU OF LABORATORIES

Monthly Abnormals by Submitter

Submitter: FAKE CUSTOMER (ALACHDIMM)
Date Reported: 09/01/2017 - 09/22/2017

Abnormal Details (Abnormal Samples Only)					
Sample ID AMB1791812	25 (7170599)	Local Patient ID	Patient FRED D FLINTSTONE	Birth Date 04/04/1971	Date Sample
0245	Syphilis TPPA		Reactive		
4000	Rubella Screen		Immune		
Sample ID AMB1791812	26 (7170600)	Local Patient ID	Patient FRED D FLINTSTONE	Birth Date 04/04/1971	Date Sampled
0245	Syphilis TPPA		Non-Reactive		
4000	Rubella Screen		Non-Immune		

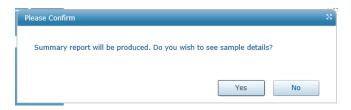
Z MonthlyAbnormalCustomer.rpt 8.50 x 11.00 in Page 2 of 2

Print Date: 9/22/2017

UNSATISFACTORY REPORT

The **Unsatisfactory Report** will list the number of unsatisfactory samples received from a submitter for a given time period. It can be run in two ways- with or without details. Sample Unsatisfactory Reasons are noted in the details.

- 7. When selecting Unsatisfactory Report:
 - a. Select whether to run the report with or without details.



b. The Unsatisfactory Report without detail (shown below) will be displayed.



DEPARTMENT OF HEALTH BUREAU OF LABORATORIES

HEALTH	Monthly Unsat by Submitter			
Submitter: FAKE CUSTOMER (ALACHDIMM) Date Reported: 05/01/2016 - 09/27/2017				
Samples Unsat	Total			
Total Samples	21			
Tests Unsat				

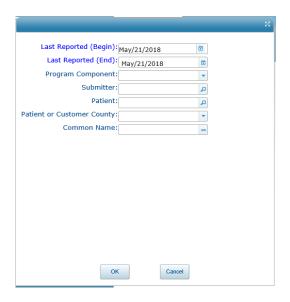
c. This is the second page of the same report if requested with details

HEALTH Monthly Unsat by Submitter					
Submitter: FAKE CUSTOMER (ALACHDIMM) Date Reported: 05/01/2016 - 09/27/2017					
		Unsat Details			
iample ID SA17028298 (7144140)	Local Patient ID	Patient FIRSTNAME A LASTNAME	Birth Date 08/16/1995	Date Sampled 05/03/2017	
Sample Unsat Reason:	Specimen in wrong/i	nappropriate collection kit.			
est amplified GC/CT	Unsat Reason Sample Unsat				
iample ID MM17000117 (7144141)	Local Patient ID	Patient FIRSTNAME A LASTNAME	Birth Date 08/16/1995	Date Sampled 05/03/2017	
est	Unsat Reason				
GC Culture	User canceled Test				
iample ID RU16000235 (6528344)	Local Patient ID	Patient FIRSTNAME A LASTNAME	Birth Date 09/04/1969	Date Sampled 05/20/2016	
Sample Unsat Reason:	mismatched hx/spec	2. I.D.			
est HV 1/2 Ag/Ab Combo	Unsat Reason Sample Unsat				
iample ID RU16000736 (6877575)	Local Patient ID	Patient FIRSTNAME B LASTNAME	Birth Date 09/27/1970	Date Sampled 11/21/2016	
Sample Unsat Reason:	WRONG SPECIME	N RECEIVED			
est	Unsat Reason				
CD4/CD8	Sample Unsat				
iample ID RU17000266 (7128656)	Local Patient ID	Patient FIRSTNAME D LASTNAME	Birth Date 03/12/1982	Date Sampled 04/25/2017	
Sample Unsat Reason:	quantity not sufficien	t			
est	Unsat Reason				
HIV-1 Viral Load	Sample Unsat				

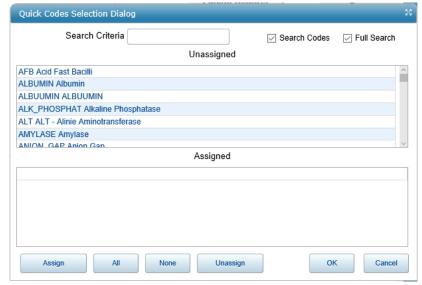
EPIDEMIOLOGY REPORTS

Epidemiology Reports provide the number of samples submitted by program and county and number of tests by program, analysis and county within a given time period.

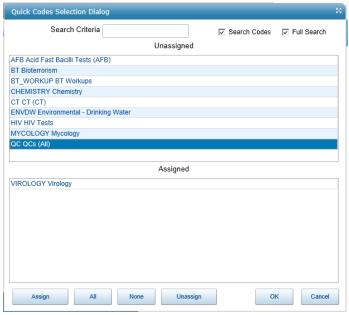
1. Enter information for the mandatory fields (Last Reported Begin and End) and other parameters if desired in the displayed dialog box. If non-mandatory fields are left blank, the report will show all data within the date range entered.



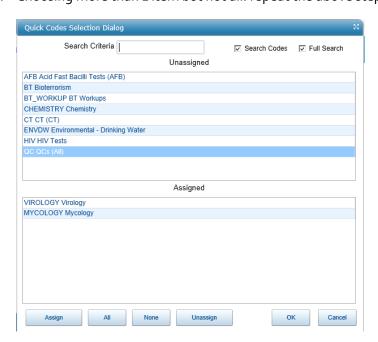
- 2. When entering filter for the Common Name (of the analysis type), a Quick Codes Selection Dialog box will appear.
- 3. LW allows a filter of one or more analysis via the Quick Codes Selection Dialog box.

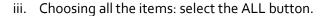


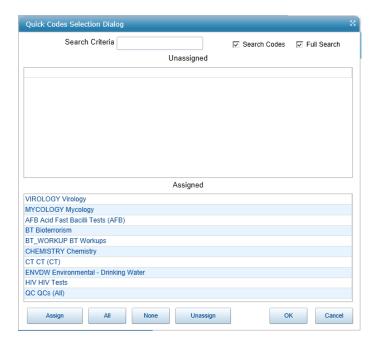
- 4. Select the desired analyses by one of the following options:
 - a. Click on the desired analysis category you would like to select and that category will be highlighted. You may either
 - i. click the "Assign" button at the bottom of the window, to add the selection to the bottom pane of the window;
 - ii. or just double click the desired category to assign it for the report. The selection will be added to the bottom pane of the window.
 - b. To select more than one items
 - i. Choosing single item: Highlight the desired item and click Assign.



ii. Choosing more than 1 item but not all: repeat the above step for the next item.





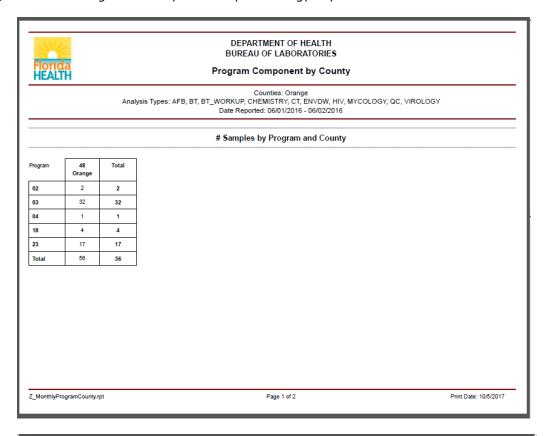


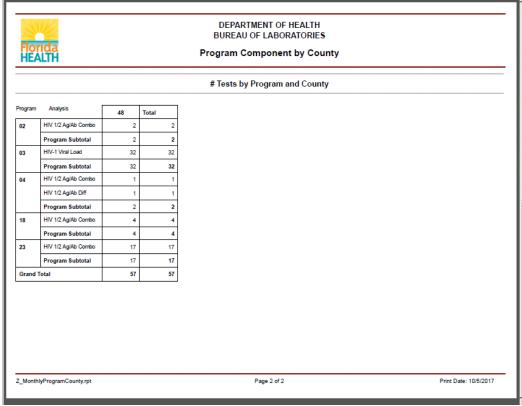
5. When all the desired analyses are selected, click OK. The selection(s) will appear in the Analysis field displayed in step 1 above.



6. If the entered parameters are satisfactory, click "OK" to display the report.

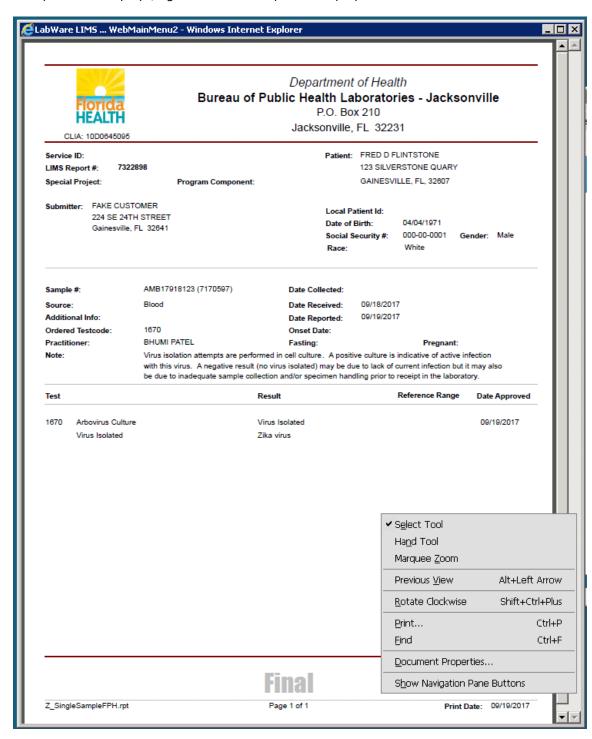
7. The following is an example of an Epidemiology Report:





PRINTING REPORTS

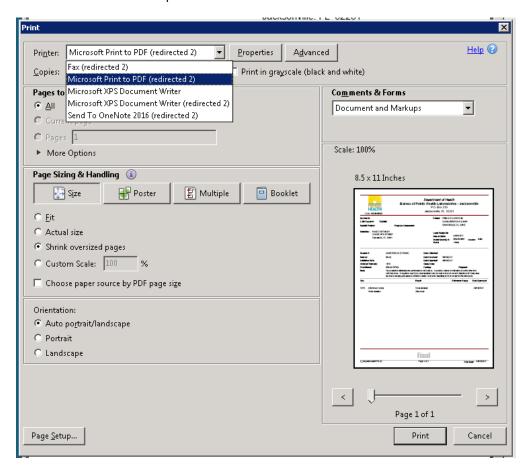
1. If no print icon displays, right click on the report to display the shortcut menu.



2. SELECT "Save As" or "Print."

Available functions will depend upon the user's internet browser and PDF application.

3. In the Print Dialog Window you may choose to save the document as a PDF, or to fax the document or send it to a printer.



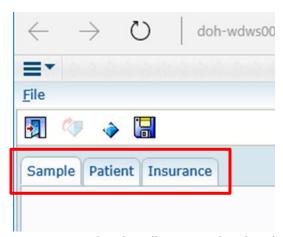
ORDERING

CREATE ORDERS

1. In WebLIMS, select Create Order

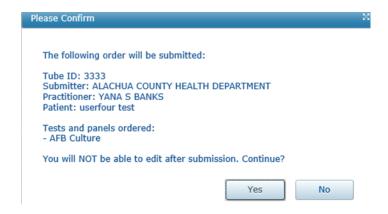


2. There are 3 tabs in the Clinical Testing Order Form page. Enter information in all the required fields in all the tabs. Detail of entries for the fields in the 3 tabs can be found in later sections.



- a. Sample tab: collects sample related information.
- b. Patient: collects patient related information.
- c. Insurance: collects patient insurance information. This is required entry if it is noted on the Patient tab that patient has insurance. Otherwise, this tab would not be available for entry.

- 3. Once all data are entered in all the tabs, in order for the order to be submitted, the order must be saved.
 - a. Note:
 - i. It is important to SAVE the order to submit.
 - ii. Selecting the CLOSE on the upper right hand corner of the window would bypass a lot of programming and the order will **NOT** be submitted.
 - b. Select YES or NO as desired in the PLEASE CONFIRM dialogue box.



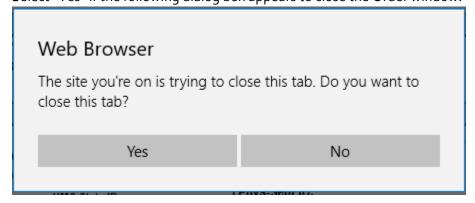
DH1847, 17 FOR BPHL USE ONLY SUBMITTER: PLACE LABELS HERE Submission No: 600 Submission Date: 05/21/2018 Receiving Lab: Jacksonville Lab Submitted By: Test User1 mtc999 ICD-10 Diagnosis Codes: Specimen Type: Sputum Program Component: Date of Collection: 05/17/2018 Special Project ID: Patient Information Submitter/Health Care Provider ALACHUA COUNTY HEALTH DEPARTMENT YANA S BANKS Patient ID: Facility Name: Physician: Date of Birth: 01/01/2000 Phys-Sent ID: SSN: HMS State ID: 15530 NW US HWY 441, STE 10010 Race: Alachua FL 32615 Ethnicity: Address: County: Insurance Information Primary Insurance state Policy No: Group No: Address: Clinical History Travel In US: Symptoms Onset Date: Travel History: Ordered Testing - TB/Mycobacteriology

4. After selecting YES to submit the order, the requisition for the sample will be displayed.

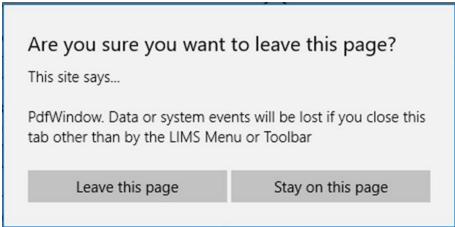
- 5. If desired, print or save the requisition by following the steps on Printing Reports (P. 31)
 - PDF Viewer WebOrder X a. To exit, select on the tab

Print Date: 05/21/2018

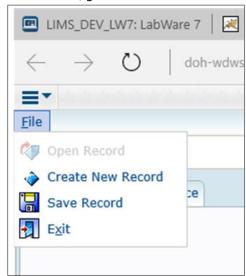
b. Select "Yes" if the following dialog box appears to close the Order window.



If the following dialog box appears, select "LEAVE THIS PAGE" if completely finished with the Requisition PDF, or select "STAY ON THIS PAGE" to keep open a tab for this requisition.



6. To create new order, go to FILE > Create New Record



7. Select the appropriate option at the following dialog box. The default information is specific to the user.



- a. When selecting one of the "COPY ..." options, the provider (and the patient information) of the previous submitted order will be automatically populated in the new order.
- b. Otherwise repeat steps for creating new orders.

SAMPLE TAB FIELD ENTRY INFORMATION

TUBE ID

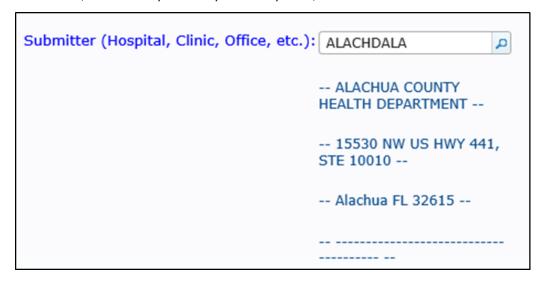


- 1. It is a required entry.
- 2. This identifies the sample submitted. Only unique numbers are to be used. If by chance a duplicate ID was entered, LabWare will not save the order and require correction.

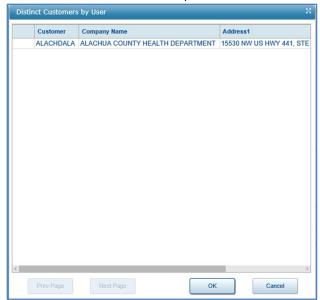


- 3. The unique ID: these IDs must be unique in a global sense among all samples submitted to BPHL.
 - a. They can be generated by the submitter or
 - b. Interested providers may request a list of numbers unique from BPHL

SUBMITTER (HOSPITAL, CLINIC, OFFICE, ETC):



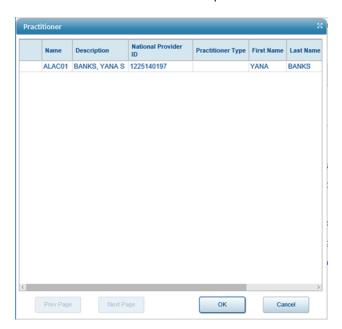
- 1. This is a required entry.
- 2. It defaults to the LabWare code for the first of the submitters authorized to the user. The expanded information of the submitter will be listed below the field.
- 3. If a different submitter is desired, clicking the on the right end of the field will display a list of available submitter for the particular users. Select the desired submitter and click OK.



PRACTITIONER (DOCTOR, CLINICIAN, ETC.)



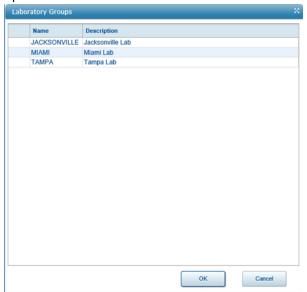
- 1. This is a required entry.
- 2. It defaults to the LabWare code for the first of the practitioner authorized to the user. The expanded information of the practitioners will be listed below the field.
- 3. If a different practitioner is desired, clicking the on the right end of the field will display a list of available submitter for the particular users. Select the desired practitioner and click OK.



RECEIVING LAB



- 1. This is a required entry.
- 2. It defaults to the BPHL that is associated to the submitter.
- 3. It can be changed to any of the three BPHL by selecting to expand the list of available options.



4. Select the desired lab and click OK.

SPECIMEN COLLECTION DATE



- 1. This is a required entry.
- 2. Enter the date in the format listed.
- 3. Click to open the calendar.



4. Select the desired date to enter into the field.

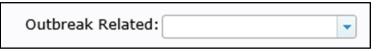
ICD-10 CODE



- 1. This is a not a required entry field.
- 2. There are 2 ICD-10 code for use.
- 3. Click to see available options of ICD-10 code.



OUTBREAK RELATED



- 1. This is a not a required entry field.
- 2. Select from the drop down to indicate if the testing is related to an outbreak.
- 3. This information is helpful when there is an investigation of an outbreak.

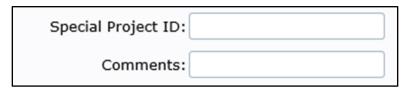
PROGRAM COMPONENT



- 1. This is a not a required entry field.
- 2. Click to select from the list of available program component codes.



SPECIAL PROJECT ID AND COMMENTS

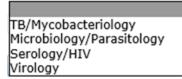


- 1. Neither of these fields are required entry field.
- 2. Enter information as desired in these fields.

TEST CATEGORY



- 1. This is a required entry field.
- 2. The drop down is empty if the RECEIVING LAB was not entered.
- 3. Select from the drop down one of the test category.

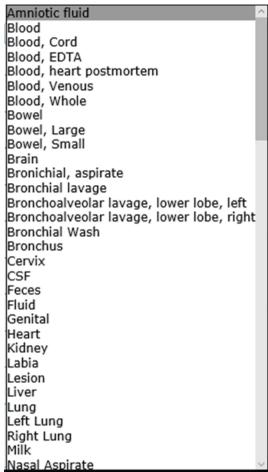


4. All available tests for ordering are grouped under one of these category.

SPECIMEN SOURCE

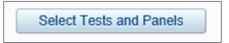


- 1. This is a required entry field.
- 2. The options available in this field is dependent on the Test Category selected.
- 3. Click to view available choices.

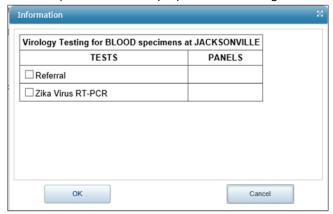


4. The tests available for selection is dependent on the specimen source. Therefore, if the desired test is not available under one specimen source, you may need to select a different but similar specimen source.

SELECT TESTS AND PANELS



- 1. This is a required entry.
- 2. The available options of tests and panels are dependent on the specimen source.
- 3. The list would be blank if either (or both) Test Category or (and) Specimen Source is (are) blank.
- 4. An example of the list displayed after clicking the button:



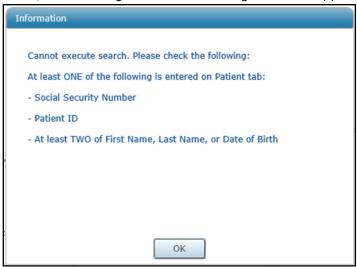
- 5. Select ALL the tests and panels desired.
- 6. Click OK to save.

PATIENT TAB FIELDS ENTRY INFORMATION

SEARCH FOR PATIENT



- 1. Click this button to search for Patient only AFTER at least one of the following information is entered on the Patient tab.
 - a. Social Security number
 - b. Patient ID this refers to the patient identifier created by LabWare
 - c. At least TWO of First Name, Last Name or Date of Birth
- 2. If not, the following informational dialogue box will appear.



- 3. Once the search conditions are met, all relevant patient information will be filled in if the patient existed in the LabWare database.
- 4. User may correct/update the information as appropriate.

FIRST NAME, LAST NAME, DOB



- 1. These are required entry fields after the Patient Search Process.
- 2. Do not include the suffixes, such as Jr., Sr., II etc. in the Last name or the first name. There is a specific field for that piece of the information.
- 3. For the Birth Date, click to access the calendar for selection of date.

NAME SUFFIX



- 1. This is an optional entry field.
- 2. Select from the drop down for the appropriate suffix to use.
- 3. Leave blank if not applicable.

PATIENT ID



- 1. This is an optional entry field. However, if this is available, the Patient Search Process can be carried out with just this piece of information.
- 2. When search, this information and the submitter are searched as a pair.

SOCIAL SECURITY NUMBER



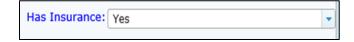
- 1. This is not a required entry field. However, if this is available, the Patient Search Process can be carried out with just this piece of information.
- 2. When entering this information, it is not important to include the "-".

PREGNANT



- 1. This is a required entry field.
- 2. Select dropdown to see all available options.

HAS INSURANCE



- 1. This is a required entry field.
- 2. When selecting YES, entry of at least one Insurance on the Insurance tab is required.

INSURANCE TAB FIELDS ENTRY INFORMATION

When the HAS INSURANCE field on the Patient Tab is YES, the first set of insurance information on this tab is required. If patient has more than one insurance, fill out the INSURANCE 2 and INSURANCE 3 as appropriate.

INSURANCE TYPE
Insurance Type:
Primary Insurance Secondary Insurance Medicaid Insurance Medicare Insurance
INSURANCE NAME, POLICY NO., GROUP NO.
Insurance Name:
Policy No:
Group No:
Complete the patient's insurance information in the above mandatory fields.
OTHER INSURANCE INFORMATION
Address:
Zipcode:
City:

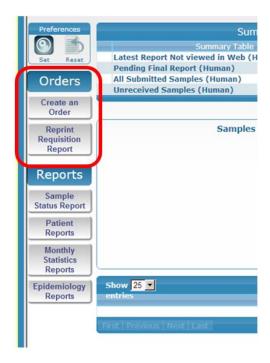
The above fields are not mandatory, but should be completed if available.

State:

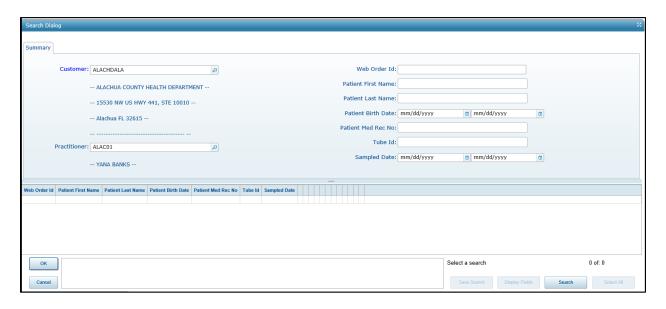
INSURANCE 2, INSURANCE 3					
If the patient has secondary and/or tertiary insurance, fill in the same way as Insurance 1 as applicable.					

REPRINT ORDER REQUISITIONS

If a copy of a previous requisition is needed, the requisition may be reprinted through **Reprint Order Requisition**.

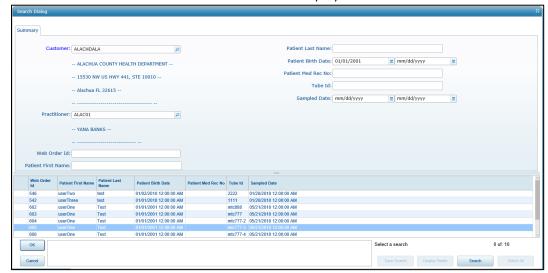


1. Enter the desired report parameters in the Search Dialog. Please note "Customer" is a mandatory field.

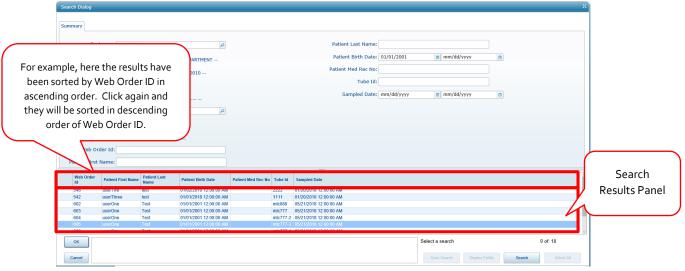


2. Select Search when finished.

3. The search results available for selection will be displayed at the bottom of the screen.

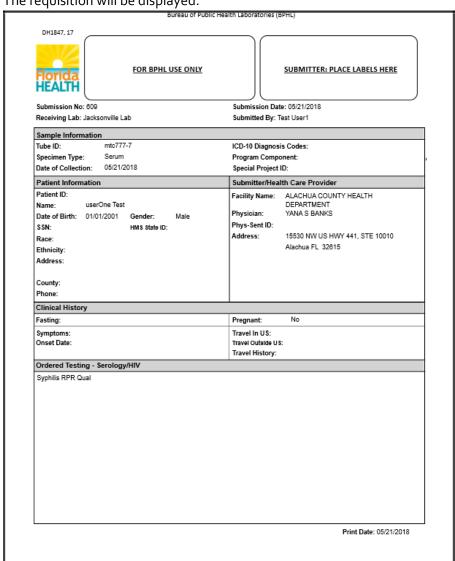


4. Search results may be sorted ascending or descending by clicking on any column header in the Search Results Panel. Results will be sorted by the information within the selected column.



5. Select the requisition desired and click "OK", or double click the selected record.

6. The requisition will be displayed.



7. Print or save the requisition if desired by following the steps on Printing Reports (P. 31)

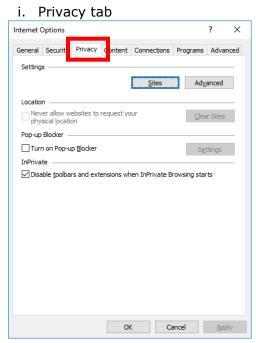
TROUBLESHOOTING

BROWSER OPTION CONFIGURATION

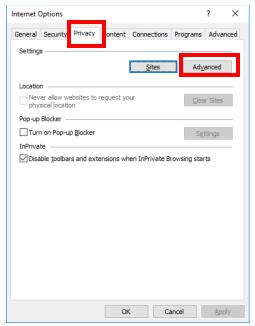
The following examples of how to configure your browser to allow session cookies, pop-ups and JavaScript are from Internet Explorer.

Steps to configure:

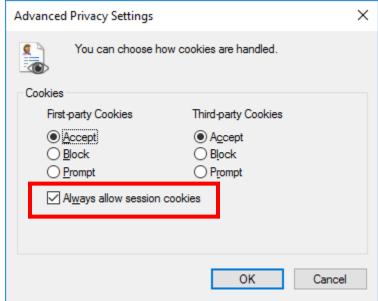
- 1. Copy the WebLIMS URL from the URL bar in Internet Explorer.
- 2. All settings are configured under the Tools | Internet Options menus
 - a. Allow session cookies:



ii. Click on Advanced



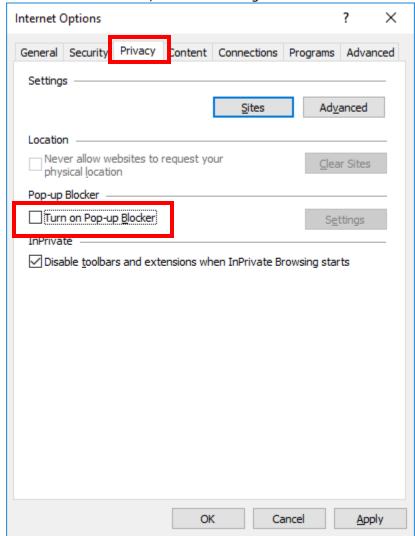
iii. Select the checkboxes for "Override automatic cookie handing" and "Always allow session cookies"



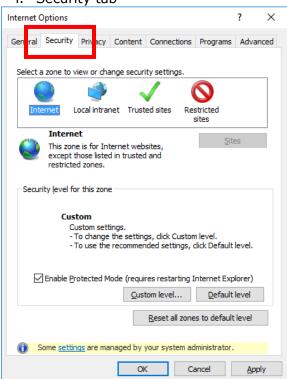
iv. Click OK

b. Allow pop-ups:

- i. While still in the Privacy tab
 - 1. Under the Pop-up Blocker section, deselect "Turn on Pop-up Blocker"
 - 2. If unable to do so due to business rules, Under Pop-up Blocker section, click on settings



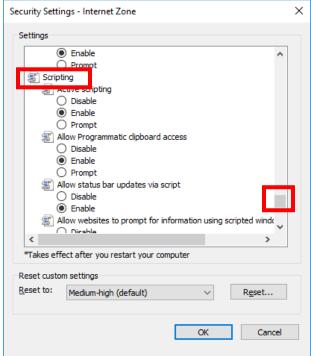
- 3. Paste the WebLIMS URL from the URL bar in Internet Explorer from Step 1
- c. Allow JavaScript:
 - i. Security tab



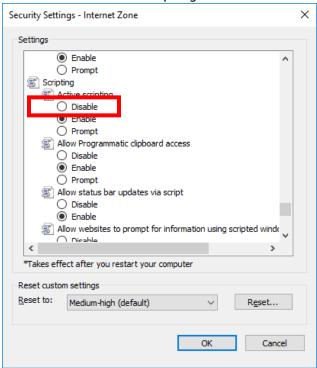
ii. Click on "Custom Level"



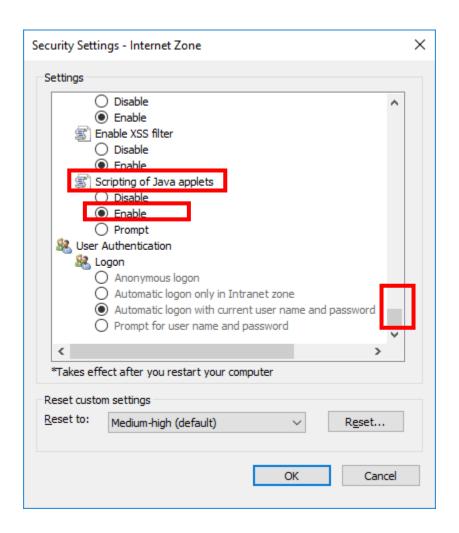
iii. Scroll down to the "Scripting" section near the bottom



iv. Enable "Active Scripting"



v. Enable "Scripting of Java applets".



CONTACT INFORMATION

Issue	Contact	Email	Tel	Fax
Access to WebLIMS	BPHL Help Desk	DLBPHLLAR@flhealth.gov	(904) 791 – 1744	(904) 791-1567
WebLIMS functionality	<u>"</u>	и	u	